

Guardian Success Story

 HUB International Insurance Services Inc. - Santa Barbara  Staff: 8  Groups: 278



Jennifer Nickel
Account Manager, HUB International
Insurance Services Inc. - Santa Barbara

Ease & Guardian - An EaseConnect+ Connection

According to Jennifer Nickel, Account Manager, HUB International Insurance Services Inc. - Santa Barbara

After finding success with other EaseConnect+ connections, HUB Santa Barbara was one of the first agencies to set up the Guardian connection when it launched. Before the Ease and Guardian connection, the HUB Santa Barbara team

was exporting online enrollment forms from Ease and manually entering them into Guardian while cross-checking the data simultaneously. Not only did it take away valuable time from the team, but it also left more room for error. Now, as a result of the Guardian connection, HUB Santa Barbara is no longer manually enrolling and cross-checking their groups' enrollment data and has increased their team's efficiency.



“As a broker, Ease made it as easy as possible for me to start using the Guardian connection. Ease took the lead in determining discrepancies between their system and Guardian's, and are continuing to do so. Ease took ownership of the entire process, and I didn't have to contact Guardian once.”

Jennifer Nickel,
HUB International
Insurance Services
Inc. - Santa Barbara

How Ease & Guardian Works for HUB - Santa Barbara



Reduced time spent manually processing eligibility changes, including new hire enrollments, terminations, and qualifying events, saving approximately 5 hours of work each week



All groups set up with the connection in one to two weeks



Improved client relationships



Enrollment data is automatically cross-checked by Ease, resolving differences between Ease and Guardian

Jennifer Nickel,
*HUB International
Insurance Services
Inc. - Santa Barbara*

Using this connection has helped improve our client relationships. With this connection, we're demonstrating how we're working smarter and leveraging all the resources on our clients' behalf. The clients also love using the connection as there is no additional work needed on their end.

The Success

The HUB Santa Barbara team needed a solution that would save their team time but would also solve the issue of resolving any data discrepancies that might arise in Guardian's system. For HUB Santa Barbara, the deciding factor in using the Ease and Guardian connection was the opportunity to increase efficiency as well as accuracy, especially with Ease's Task Management feature, which lets HUB Santa Barbara track any outstanding items that need to

be addressed. Additionally, HUB Santa Barbara has found that Ease's user interface has been one of the best parts of their experience as the system has been easy to use, not only for their firm, but also for their clients. As a result of using the connection, HUB Santa Barbara's relationships with their clients has improved and HUB Santa Barbara's clients appreciate how they are leveraging Ease's resources.